

GLOBAL CONSUMER TRENDS

HEALTH EDITION



dynata™

EXECUTIVE SUMMARY

Global Consumer Trends: Health Edition

The flip of the calendar to the New Year of 2021 means the delivery of the first COVID-19 vaccines and the possibility of an end to the Coronavirus pandemic. After a unique year of change, uncertainty and disruption in our daily lives, there seems to be a light at the end of the tunnel for a return to “before.”

The presence of vaccines has spurred discussion around where and when it will be available, and to whom, and what could help encourage consumers to get it themselves. Alongside this anticipation, the availability of vaccines has thrown the current state of our health into sharp relief, revealing the changes to – and new habits of – our physical and emotional wellness. This ranges from access to doctors and treatments to how (and where) we are staying in shape and the ways we are coping with the stress and anxiety brought on by the Coronavirus.

Dynata’s Global Consumer Trends: Health Edition report explores these topics, examining attitudes and opinions of consumers surrounding both the vaccines and our general health and well-being around the world. Is there a trusted source of information we turn to for information on the vaccines? Who could influence consumers to get vaccinated? How are our healthcare systems coping? What’s the state of our physical and mental well-being? What mental and physical health improvement changes will we take into the post-pandemic future?

Drawing on the largest first-party data asset in the industry, Dynata’s Global Consumer Trends: Health Edition report uses more than 11,000 responses from consumers in 11 countries around the world to delve into the attitudes, changes and opinions in consumer trends as the new year of 2021 takes shape.

METHODOLOGY STATEMENT: Dynata’s Global Consumer Trends Report: Health Edition survey covered the USA, Canada, UK, France, Spain, Germany, The Netherlands, Italy, China, Japan and Australia from January 4-11, 2021. Participants were selected across all Dynata’s research panel assets, and the samples quota-controlled to reflect the population on Age, Gender and Region. Generations were broken out as follows: Gen Z - age 16-24; Millennial - 25-39; Gen X - 40-55; Baby Boomer - 56-74; and Silent - 75+. Sample sizes were USA (1,005), Canada (1,006), UK (1,019), Spain (1,003), France (1,012), Germany (1,013), The Netherlands (1,013), Italy (1,014), China (1,008), Japan (1,010) and Australia (1,011) – Total 11,114. Given these sample sizes the margin of error (at the 95% confidence level) is +/- 3% at the country level, +/-1% at the total level.



KEY FINDINGS FROM THE REPORT INCLUDE:

1

People are glad the vaccines are here and they are ready for their shots - but there are some concerns

Forty-six percent of people said they were relieved to hear of the vaccine's development, and four in ten will try to get it as soon as possible, led by men (49%) and Baby Boomers and the Silent Generation at 49% and 56%, respectively. Women (37%) and Millennials (42%) are more concerned about longer-term side effects of the vaccine.

2

Medical professionals are the most trusted sources for COVID-19 information

For vaccine information, people trust their family doctor or other medical professionals they know personally (59%). News media, government officials and social media are less trusted sources.

3

Celebrities can play a leading role in getting people vaccinated

Entertainment and sports celebrities are seen as the most influential in convincing people to get the vaccine at 47%, followed by people who have similar chronic medical conditions to themselves at 39%. Politicians and other civic/governmental leaders are perceived as less influential, whether at the national or local level.

4

Mental health is a concern, and people are taking comfort in family and friends

Four in ten consumers report a rise in anxiety or stress during the pandemic. Talking to a friend and/or family member is the top choice to cope with this increase, at 43% (47% among women), more than twice as popular as consulting a mental health professional. More than eight in ten (83%) plan to continue their anxiety/stress management practice after the pandemic.

5

Exercise is on the rise, streaming fitness services/apps are getting a boost

Half of consumers are exercising as much or more than they were before. Among those exercising more now, 54% are doing so in their homes. Those using in-home fitness streaming services or apps, cardiovascular equipment, or strength training at home are engaging in these activities even more than they did before the pandemic. Overall, 53% of those exercising during the pandemic have acquired some type of equipment.

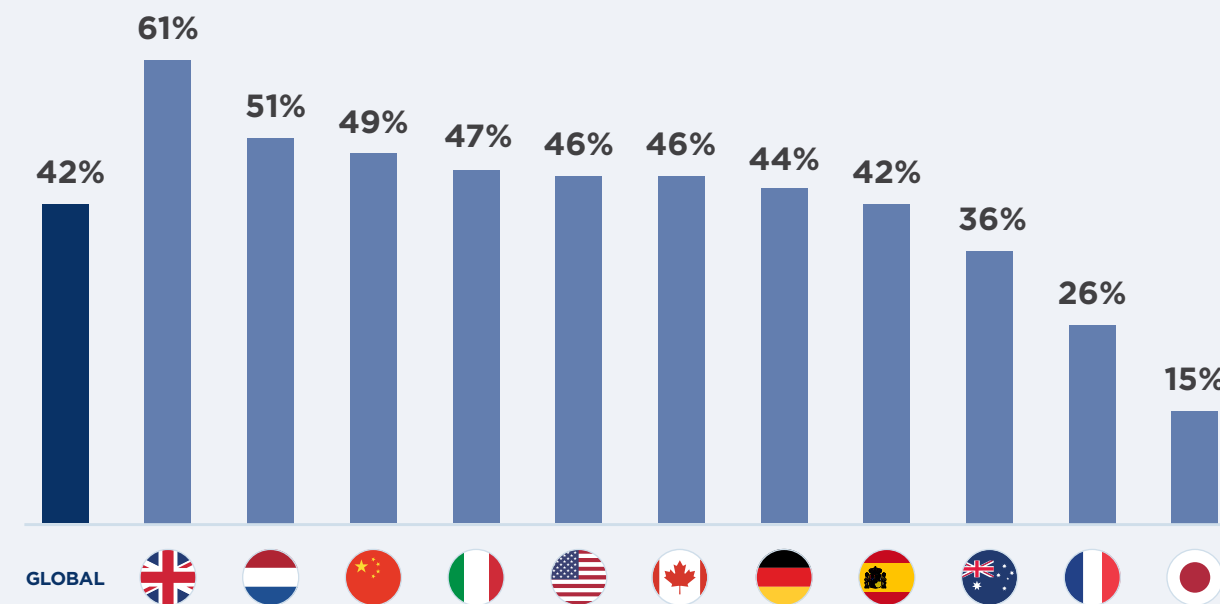


CONSUMER VACCINE PLANS

ENTHUSIASM & CAUTION FOR THE COVID-19 VACCINES

4 IN 10 PEOPLE GLOBALLY WANT TO GET VACCINATED AS SOON AS POSSIBLE

% THAT WOULD TRY TO GET VACCINATED IMMEDIATELY
(ONCE A VACCINE IS AVAILABLE)



 36%  49%

Women are more likely than men to “wait and see.”

Close to half of men (49%) would like to get vaccinated right away, compared with 36% of women.

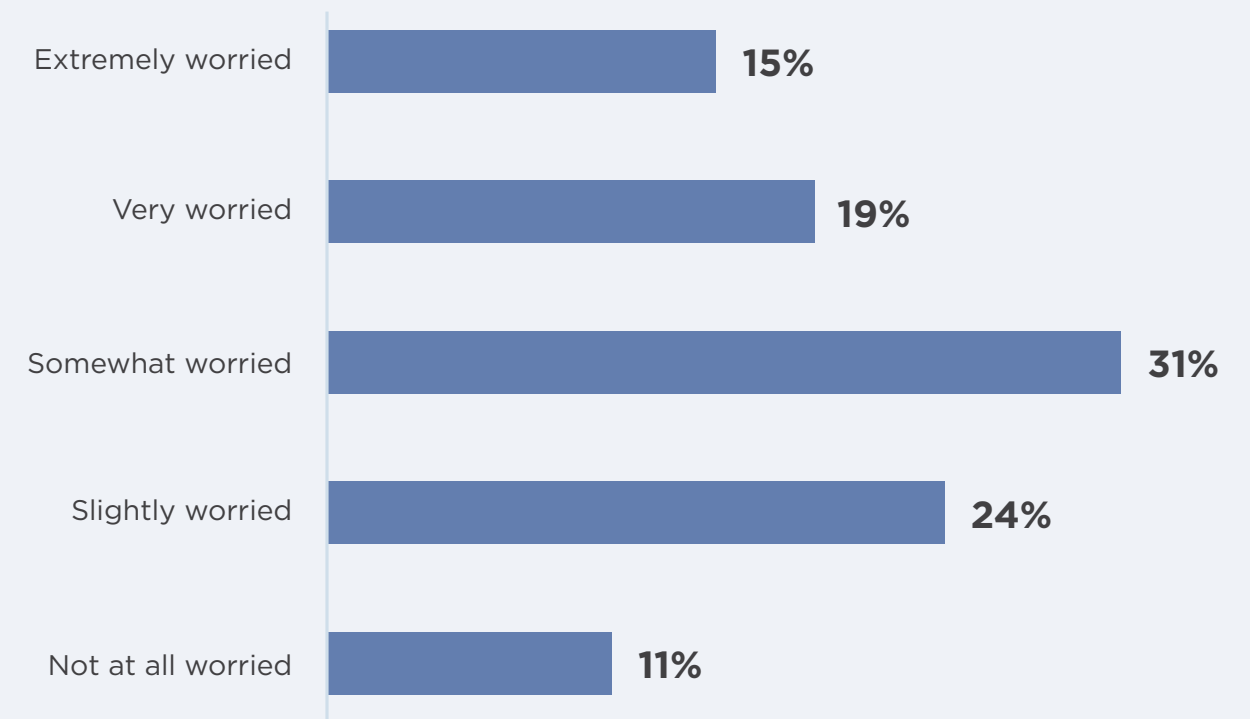
Women are taking a more cautious approach, with 31% saying they will wait to be sure it's safe, compared with 23% of men.

MOST HAVE AT LEAST SOME CONCERNS ABOUT THE LONG-TERM EFFECTS OF THE COVID-19 VACCINES

► INSIDE THE NUMBERS

The UK is most enthusiastic about getting vaccinated right away and among the least worried countries about longer-term effects. People in Japan are most hesitant about the vaccines, with 53% wanting to be sure it's safe first.

% WORRIED ABOUT THE LONG-TERM EFFECTS OF THE VACCINES



Women and Millennials are most anxious about developing problems down the line. Women (37%) and Millennials (41%) are most worried (“extremely” or “very”) about possible longer-term side effects of vaccination.

France and the USA are the countries with the greatest concern about longer-term effects. France (42%) and the USA (40%) are most worried, while the UK (46%) and Germany (53%) are least worried (“slightly” or “not at all”).

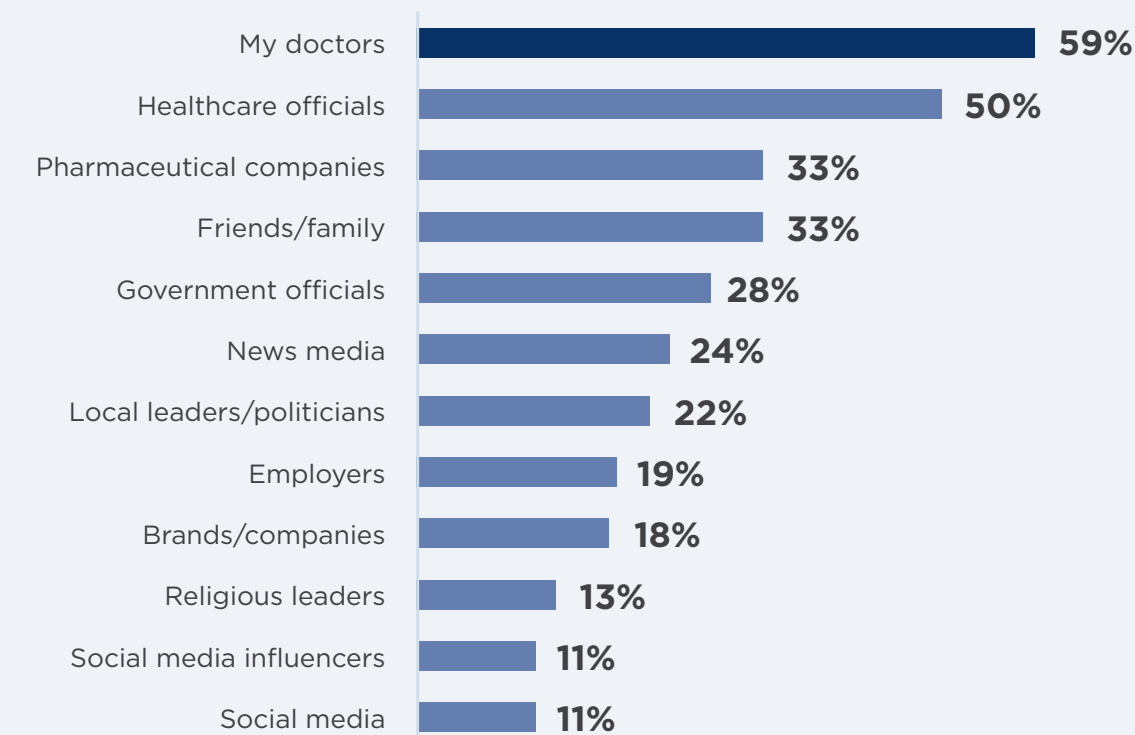


REACTIONS TO THE VACCINES & THEIR ROLLOUT

MOST TRUSTED SOURCES FOR INFORMATION ON THE VACCINES

FOR INFORMATION ON THE COVID-19 VACCINES, **PEOPLE TRUST THEIR OWN DOCTORS** MORE THAN ANYONE

% TRUST “TOTALLY” OR “A LOT” FOR
INFORMATION ABOUT THE VACCINES



▶ IMPENDING IMPACT

Public information campaigns about the vaccines may gain greater awareness using doctors and other community medical professionals, given their position as the most credible sources.



Men have a greater tendency than women to trust vaccine information from their doctors.



Social media is the least credible source of vaccine information.

Social media platforms (67%) and influencers (69%) are the least trusted sources for information on the vaccines (trust “slightly” or “not at all”).

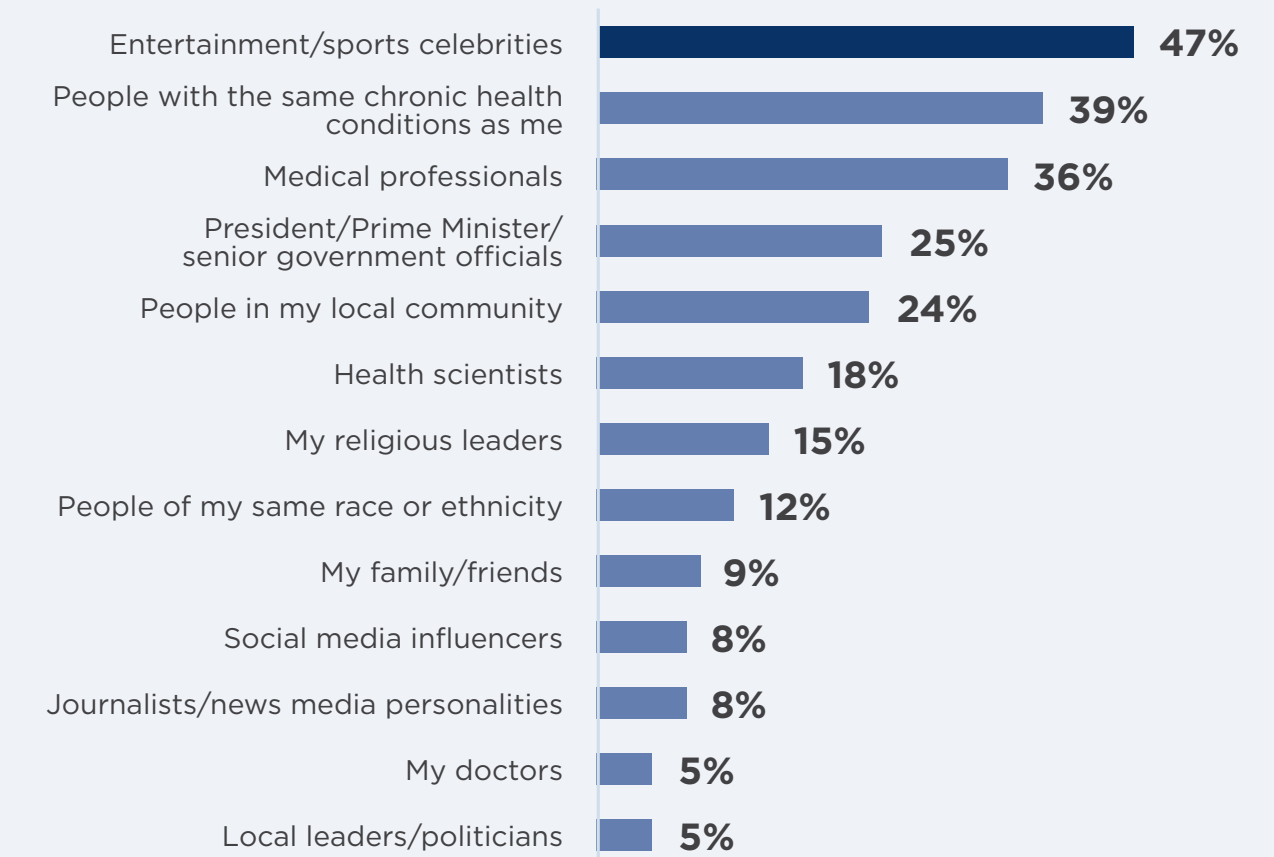
CELEBRITIES HAVE THE MOST POWER TO INSPIRE PEOPLE TO GET VACCINATED

► IMPENDING IMPACT

While physicians are the most trusted as sources of information on the vaccines, videos of celebrities and/or people with chronic health conditions receiving a COVID-19 vaccine may be more effective for agencies and organizations looking to encourage consumers to get vaccinated themselves.

MOST POPULAR INFLUENCERS TO ENCOURAGE PEOPLE TO GET VACCINATED

% who would feel confident being vaccinated if they could watch a video of a member of this group receiving a COVID-19 vaccine



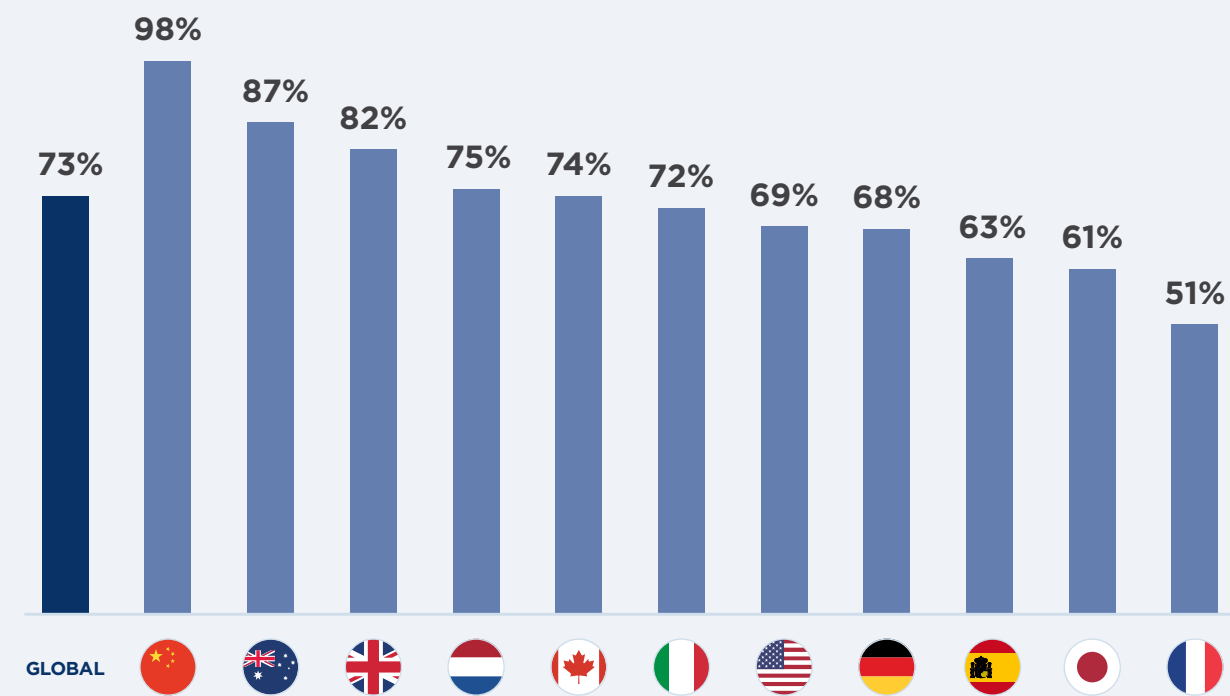
Both genders are equally likely to be influenced by celebrity vaccinations.

Men and women agree that seeing a video of an entertainment or sports celebrity getting vaccinated would make them feel most confident about doing so themselves (47% for both).

For older generations, people with similar health issues have the most sway. Videos of people with similar chronic health conditions taking the vaccine would be most influential for the Silent Generation (57%).

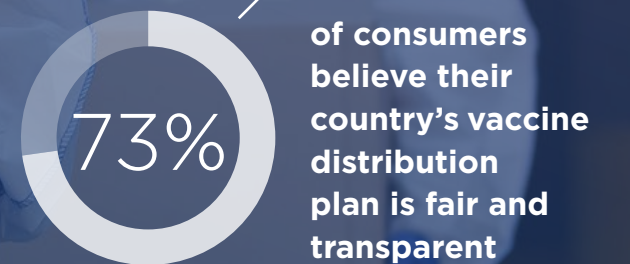
3 OUT OF 4 GLOBALLY BELIEVE THEIR COUNTRY'S VACCINE DISTRIBUTION PLAN IS FAIR AND TRANSPARENT

% "STRONGLY" OR "SOMEWHAT" AGREE THAT THEIR COUNTRY'S PLAN FOR DISTRIBUTING THE VACCINES IS FAIR AND TRANSPARENT



► INSIDE THE NUMBERS

France (14%) and the USA (11%) are most likely to refuse the vaccine, compared to the global average of 6%.



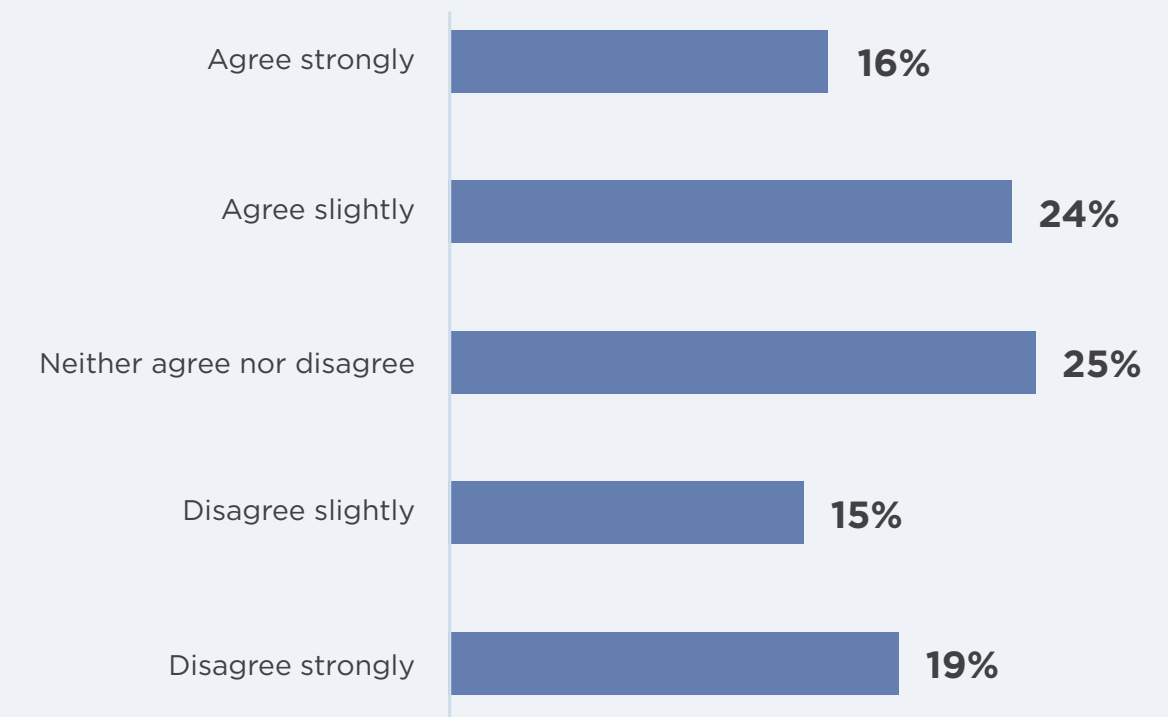
While most expect a fair distribution plan in their country, far fewer feel that plan is clear and can be delivered as promised. Only a third believe their country's plan is "extremely" or "very" clear (34%) and feel confident it can be delivered (35% "extremely" or "very" confident).

4 IN 10 PEOPLE BELIEVE THE VACCINE SHOULD BE A LEGAL REQUIREMENT

► LOOKING BACK

French consumer agreement that their country's vaccine distribution plan is fair and transparent has dropped precipitously in recent weeks, from 90% in a Dec. 2020 Dynata survey to 51% in this "Health Edition" survey.

% AGREE/DISAGREE THAT IT SHOULD BE A LEGAL REQUIREMENT TO BE VACCINATED AGAINST COVID-19

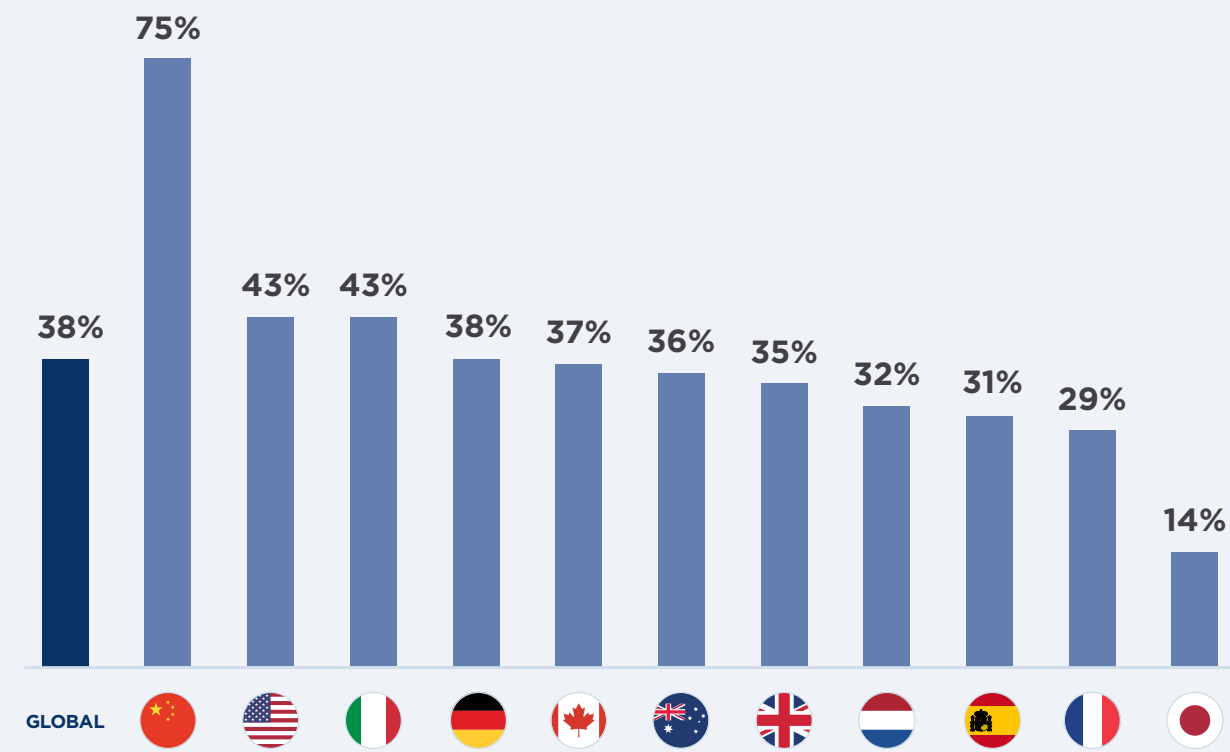


Men are more in favor of vaccination being required.

Men (45%) believe "strongly" or "slightly" that the vaccine should be a legal requirement, compared with 36% of women. Men 25 to 44 are the cohort most likely hold this belief, at 50%.

FOUR IN TEN GLOBALLY HAVE HIGH CONFIDENCE THE VACCINES WILL BRING THE PANDEMIC TO AN END

% “EXTREMELY” OR “VERY” CONFIDENT THE
VACCINES WILL BRING THE PANDEMIC TO AN
END IF ENOUGH PEOPLE ARE VACCINATED



**China is most optimistic
about the vaccines' ability to
return life to normal, but other
countries aren't so sure.**



Almost four in ten (38%)
globally believe the COVID-19
vaccines, assuming enough
people are vaccinated, will bring
the pandemic to an end. A
similar number (37% “extremely”
or “very” likely) think their lives
will return to normal after they
are fully vaccinated, led by China
at 77% and the USA at 41%.

PEOPLE ARE TAKING THE LONG VIEW OF WHEN LIFE WILL RETURN TO NORMAL

% WHO PREDICT THE PANDEMIC WILL END IN THREE MONTHS' TIME



Women and older people are more likely than other gender/age groups to believe the pandemic won't end this year.

Almost one third (31%) of consumers predict the pandemic will go on for longer than a year. This view is stronger among women (34%) and older generations (Baby Boomers and Silent Generation at 36%).

▶ LOOKING BACK

In March 2020, Dynata asked more than 13,000 consumers when they thought the pandemic would end, and nearly everyone who responded - 95% - couldn't imagine the virus extending over a year.

% WHO AGREE THINGS WILL NEVER BE "NORMAL" AGAIN



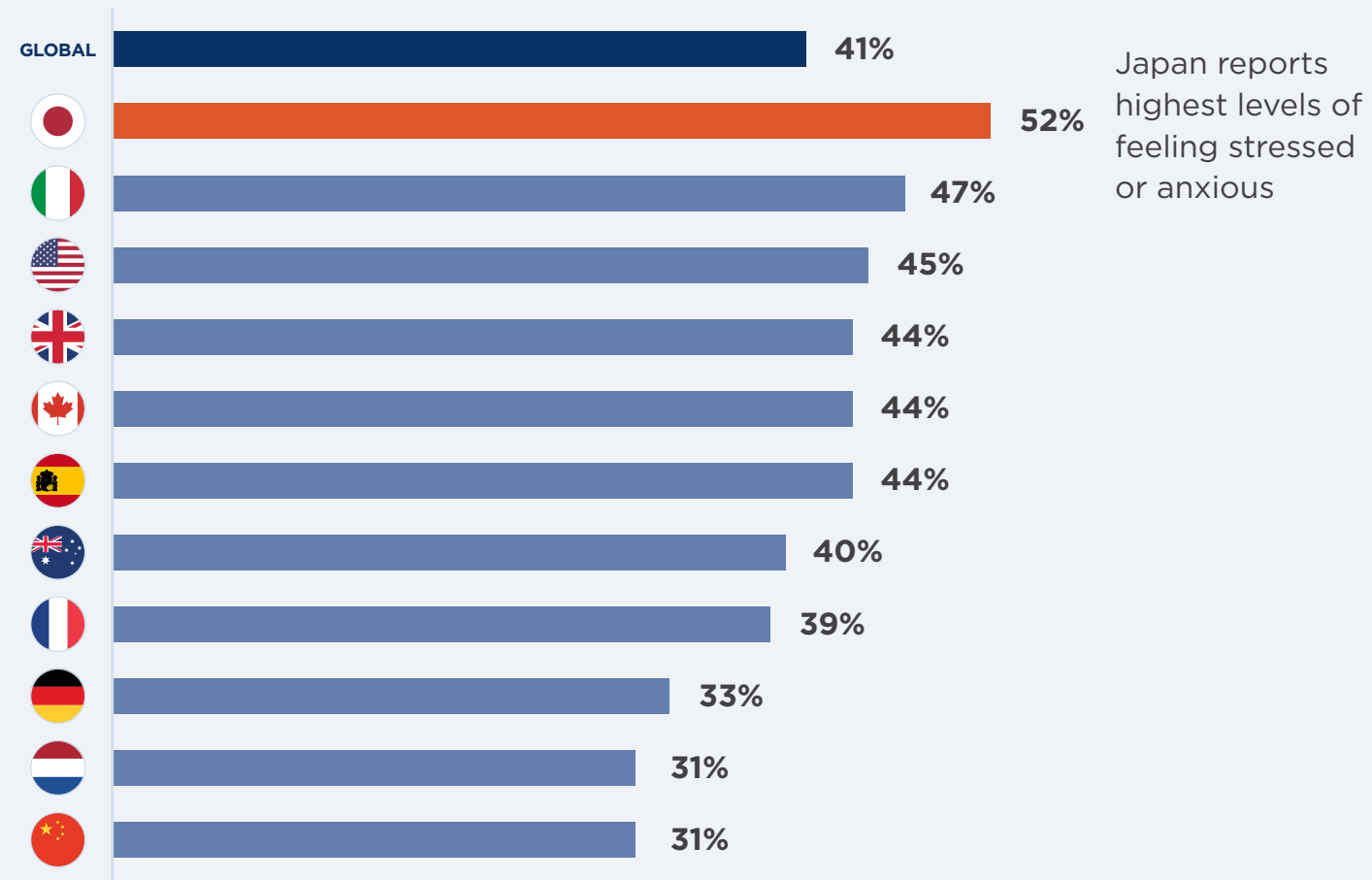


MENTAL & PHYSICAL WELL-BEING: GETTING & STAYING HEALTHY

STRESS & ANXIETY, COPING MECHANISMS, LIFESTYLE CHANGES & FITNESS

4 IN 10 GLOBALLY ARE FEELING MORE STRESSED OR ANXIOUS THAN BEFORE THE PANDEMIC

% FEELING “MUCH MORE” OR “A LITTLE MORE” STRESSED OR ANXIOUS THAN BEFORE THE COVID-19 PANDEMIC



 45%

of women are feeling “much more” or “a little more” anxiety/stress during the pandemic

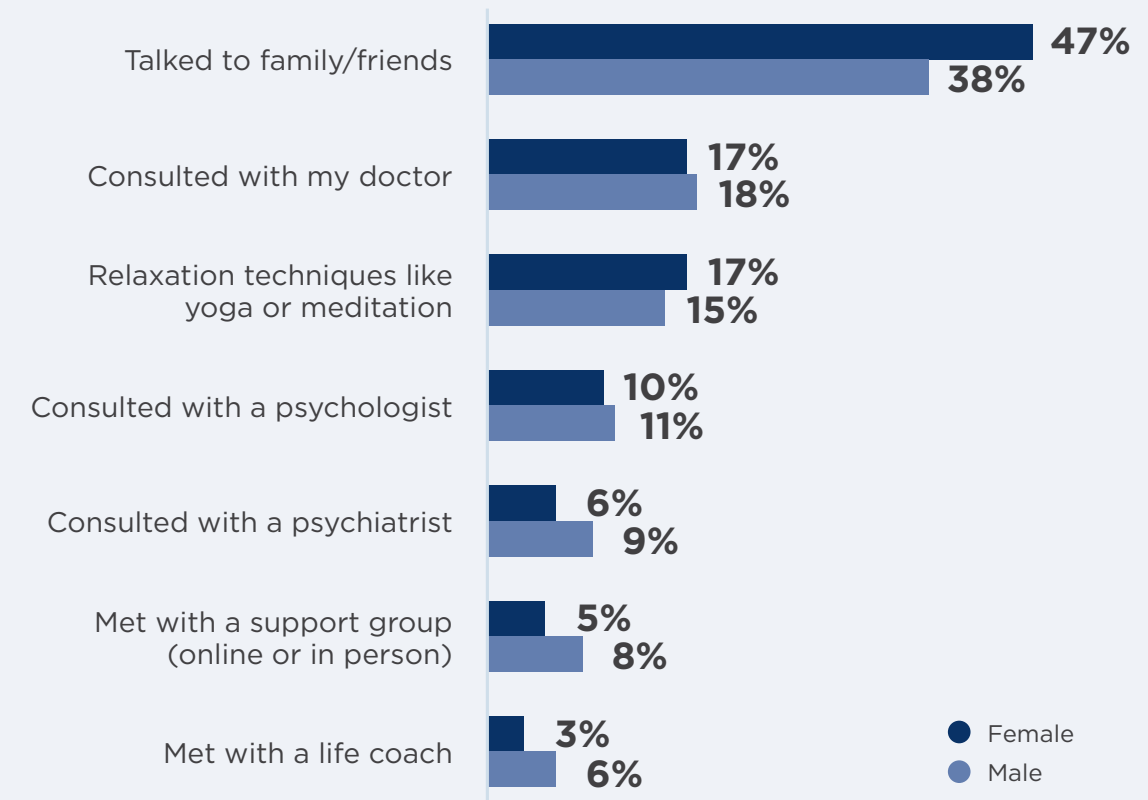
This is compared to 37% of men. Gen Z, Millennials and Gen X are feeling more anxiety/stress (at least 42% for all) than Baby Boomers & Silent Generation at 36% each.

PEOPLE ARE COPING WITH STRESS AND ANXIETY BY TALKING TO LOVED ONES

► INSIDE THE NUMBERS

Among those who have adopted a new behavior to relieve their anxiety, more than 8 in 10 (83%) plan to continue that practice after the pandemic has ended.

HOW PEOPLE ARE COPING WITH INCREASED STRESS OR ANXIETY LEVELS

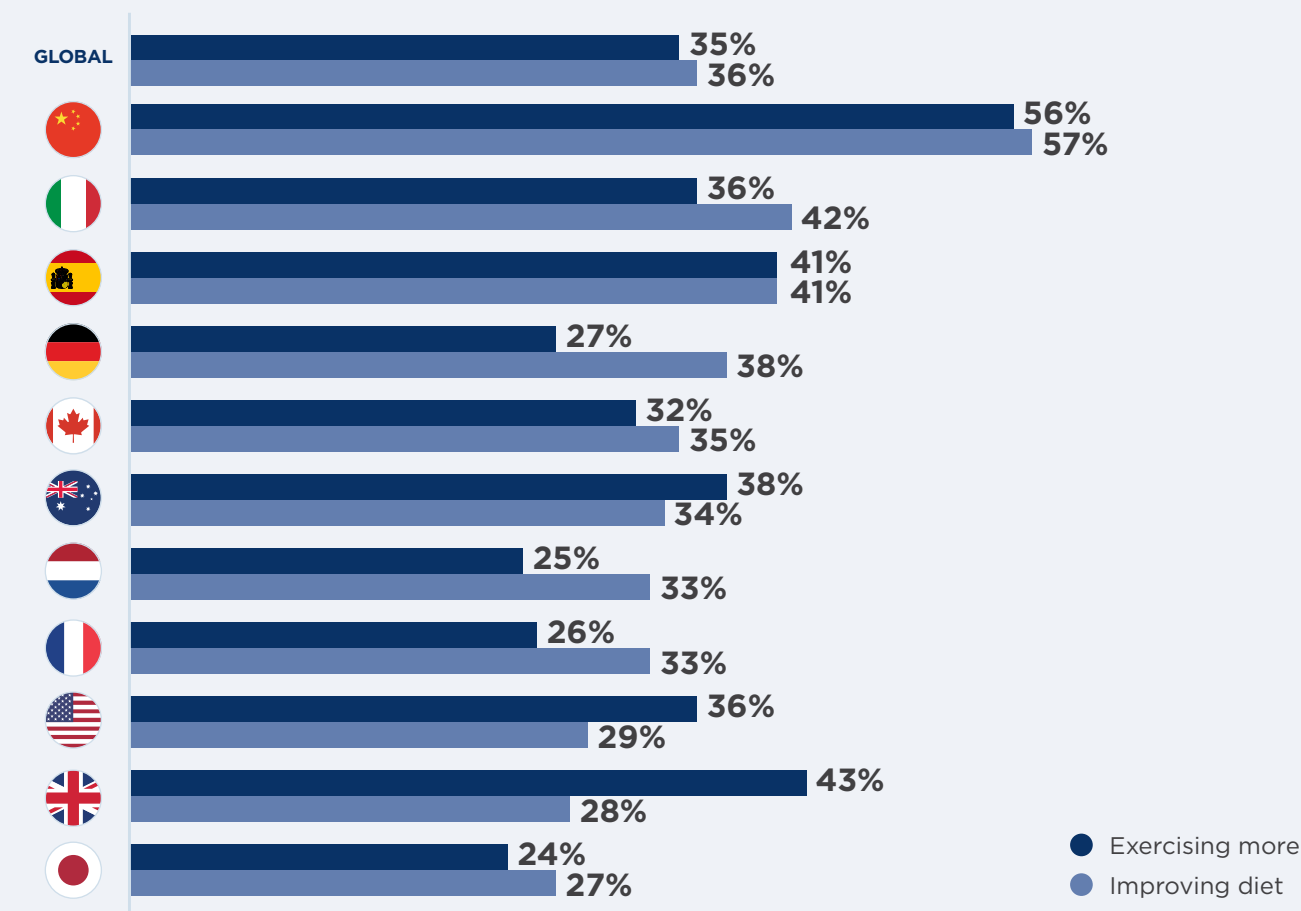


Women are more likely than men to talk to people they know, while men show a higher tendency to turn to professionals.

Close to 1 in 6 (17% of women, 15% of men) are also using relaxation techniques like yoga or meditation.

MORE THAN ONE THIRD OF CONSUMERS ARE **EXERCISING OR EATING BETTER** TO REDUCE THEIR RISK OF SERIOUS ILLNESS IF THEY CATCH COVID-19

% EXERCISING MORE OR IMPROVING THEIR DIET TO REDUCE RISK OF COVID-19 COMPLICATIONS



► INSIDE THE NUMBERS

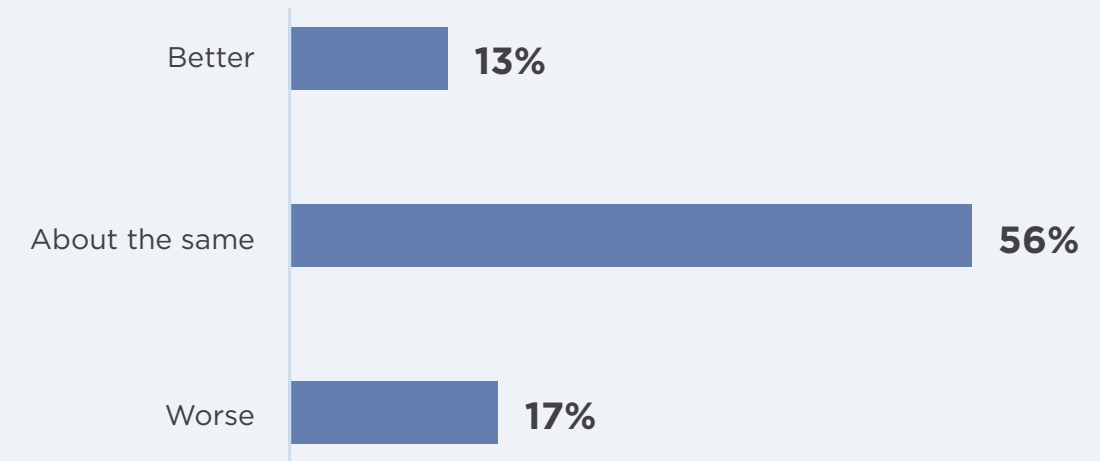
The pandemic is changing people's waistlines - 28% are heavier than before the pandemic, and 25% have lost weight during this period.

Younger generations, especially younger men, are more likely to be exercising more to protect against COVID complications.

More Gen Z and Millennials (both 40%) are exercising to prevent COVID-19 complications, highest among all generations. Men under 35 are especially likely to be exercising to ward off more serious illness, at 42% for 16-24-year-old man and 44% for 25-34-year-old men.

SEX LIVES ARE A LITTLE WORSE DURING THE PANDEMIC

SEX LIVES TODAY VERSUS PRE-PANDEMIC LEVELS

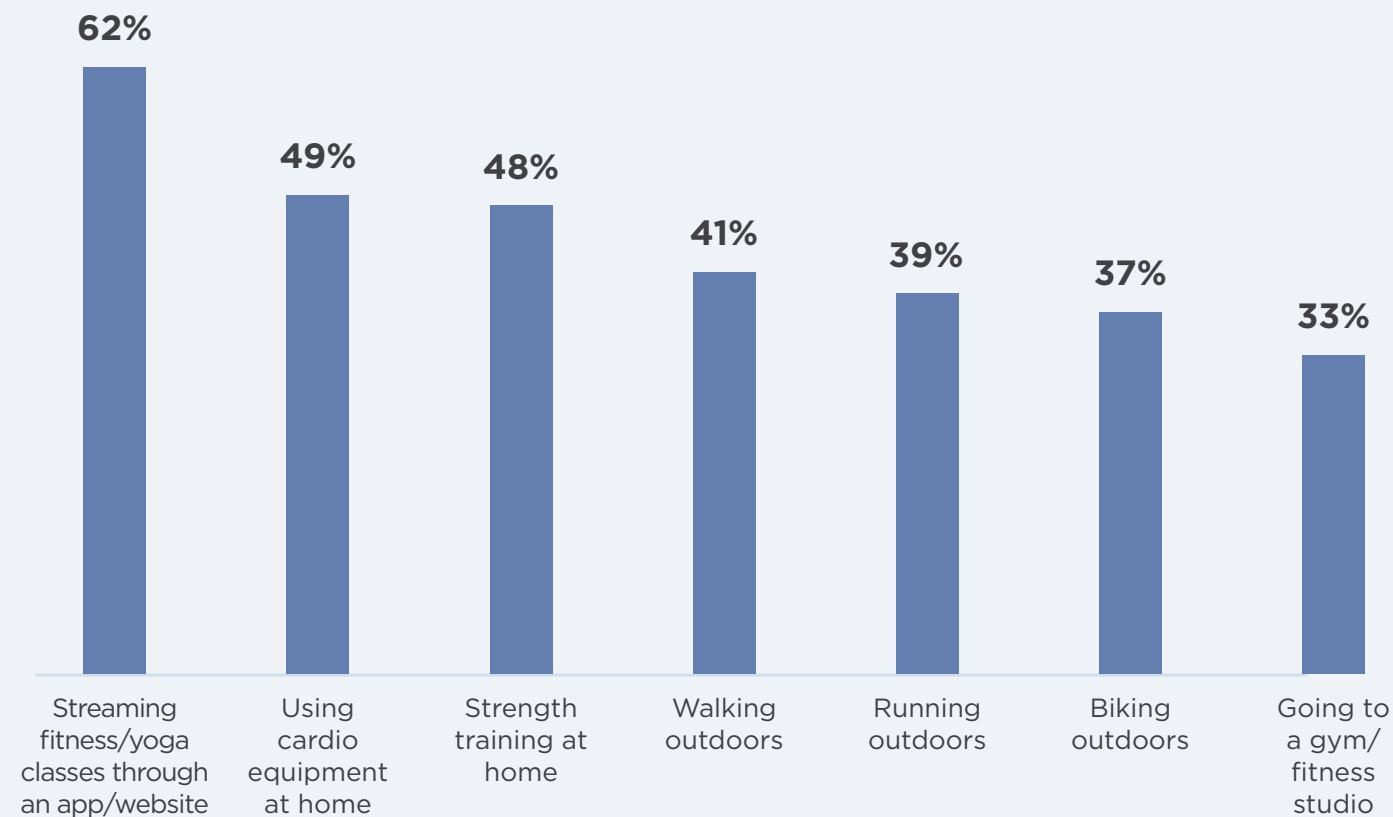


Younger generations noted an improvement in their sex lives, while older generations reported no change.

Gen Z (22%) and Millennials (21%) were most likely to say their sex lives were “much” or “a little” better during the pandemic. Sex lives have been status quo for about two-thirds of Baby Boomers and the Silent Generation.

HOME FITNESS BOOMS FOR AVID EXERCISERS; STREAMING FITNESS SEES BIGGEST INCREASE

% OF THOSE WHO ENGAGE IN THESE ACTIVITIES DOING THEM MORE THAN BEFORE THE PANDEMIC



► INSIDE THE NUMBERS

Outdoor walks (64%) are the most common activity among those exercising more during the pandemic. A third (32%) of avid exercisers are running and 25% are biking.



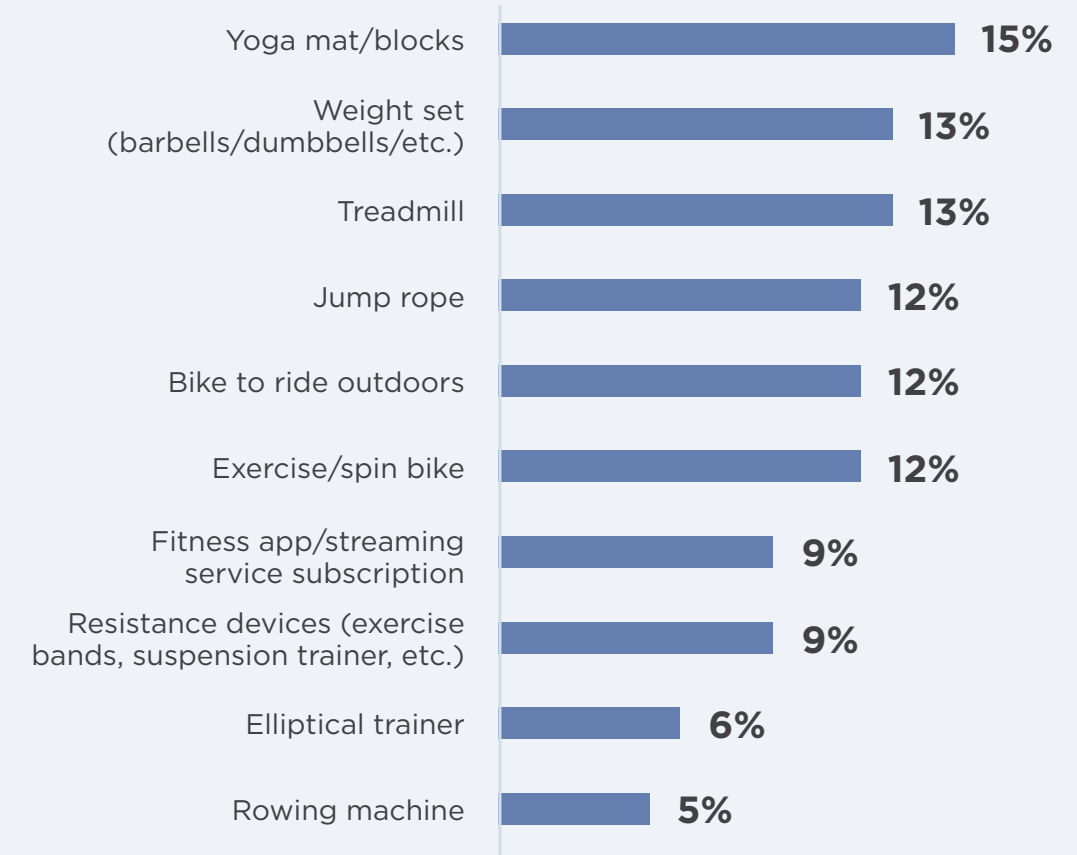
Strength training is the most common form of home exercise among those exercising more than before the pandemic.

Among people who have been exercising more than before the pandemic, strength training (33%), using cardio equipment (24%), and streaming fitness apps (21%) are the most common home fitness activities.

EXERCISERS ARE PURCHASING EQUIPMENT FOR THEIR HOME WORKOUTS

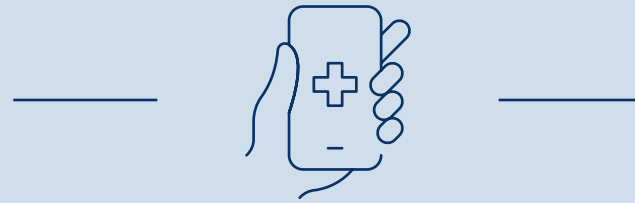


HOME FITNESS EQUIPMENT PURCHASES BY EXERCISER DURING THE PANDEMIC



Those getting new equipment are more likely to be under age 45.

In all, more than half of exercisers (53%) have acquired fitness equipment during the pandemic. Seven in 10 exercisers aged 16 to 44 (71%) have acquired new equipment, compared with 34% of those 45 and over.

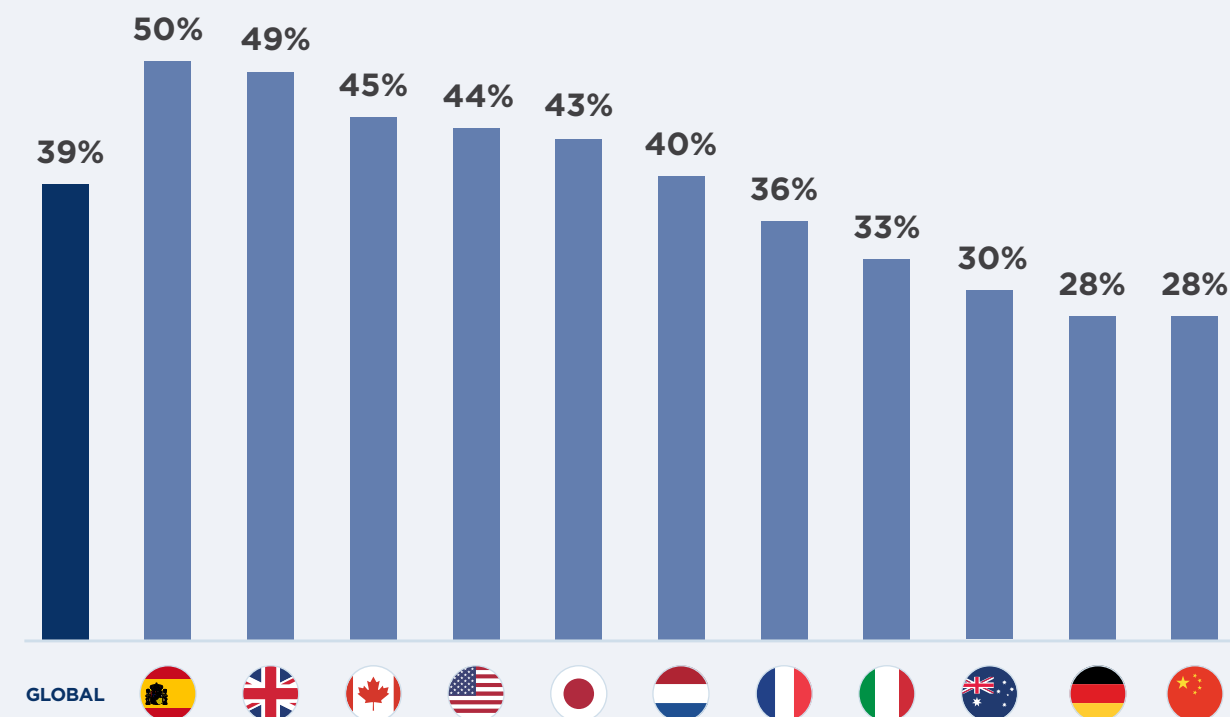


HEALTHCARE & PATIENT ACCESS

HEALTHCARE SYSTEM CONCERNS, USAGE & THE FUTURE OF HEALTH ACCESS

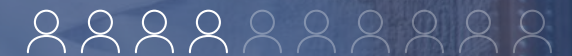
SPANIARDS AND BRITS ARE MOST WORRIED ABOUT HOW THEIR HEALTHCARE SYSTEM WILL COPE WITH COVID-19

% “EXTREMELY” OR “VERY” WORRIED ABOUT THE ABILITY OF THEIR COUNTRY’S HEALTHCARE SYSTEM TO COPE WITH COVID-19



▶ IN THE NUMBERS

Germany (39%), Australia and China (both 37%) are least worried (“slightly” or “not at all” worried) about their healthcare systems’ ability to cope with COVID-19.

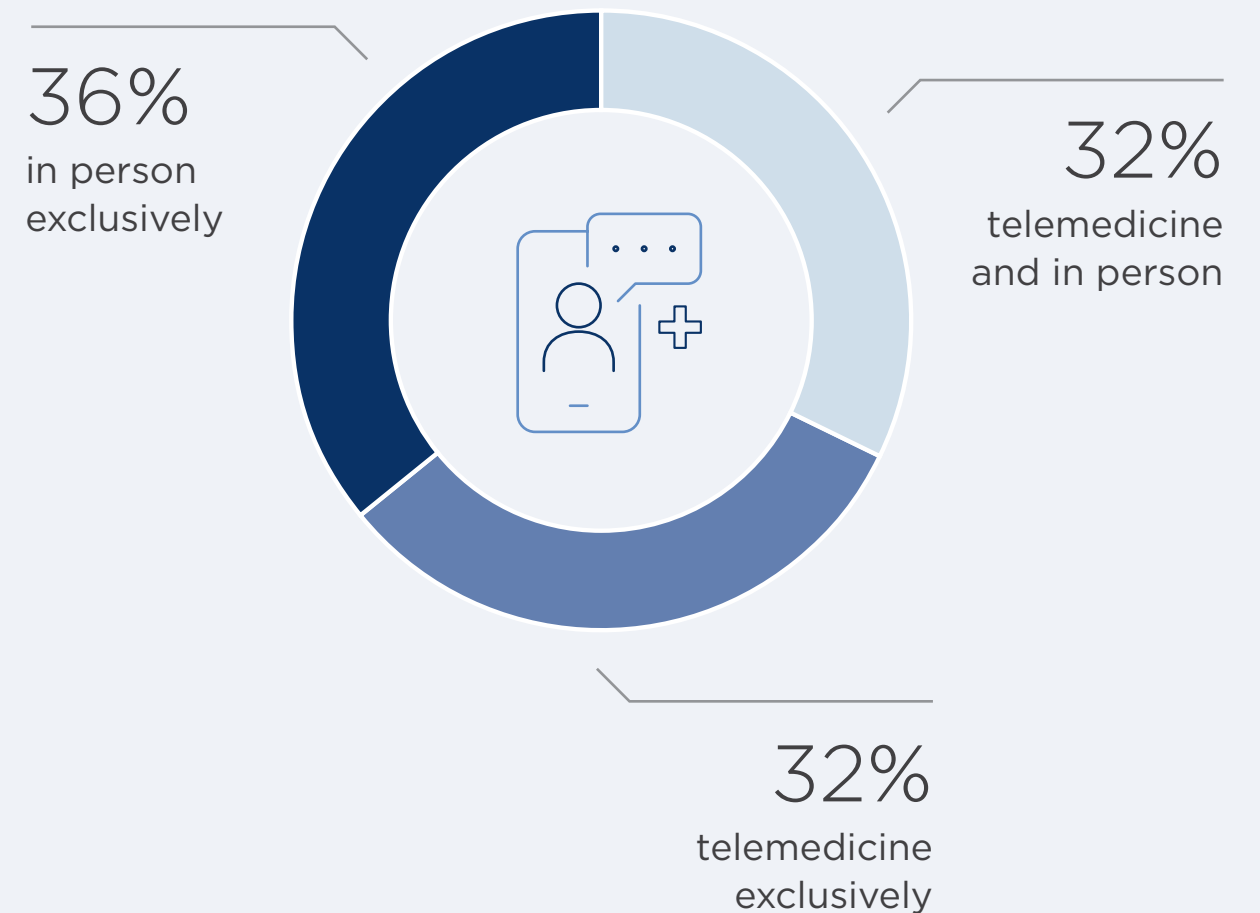


In general, four in ten men and women are “extremely” or “very” worried about their healthcare system.

Men (38%) and women (40%) are almost equally concerned about how their healthcare system will cope with the pandemic. Concern is highest amongst those who want a vaccine immediately (42%) and among those who are exercising more (44%).

TWO-THIRDS OF PEOPLE WHO HAVE SEEN A HEALTHCARE PROFESSIONAL DURING THE PANDEMIC* USED TELEMEDICINE

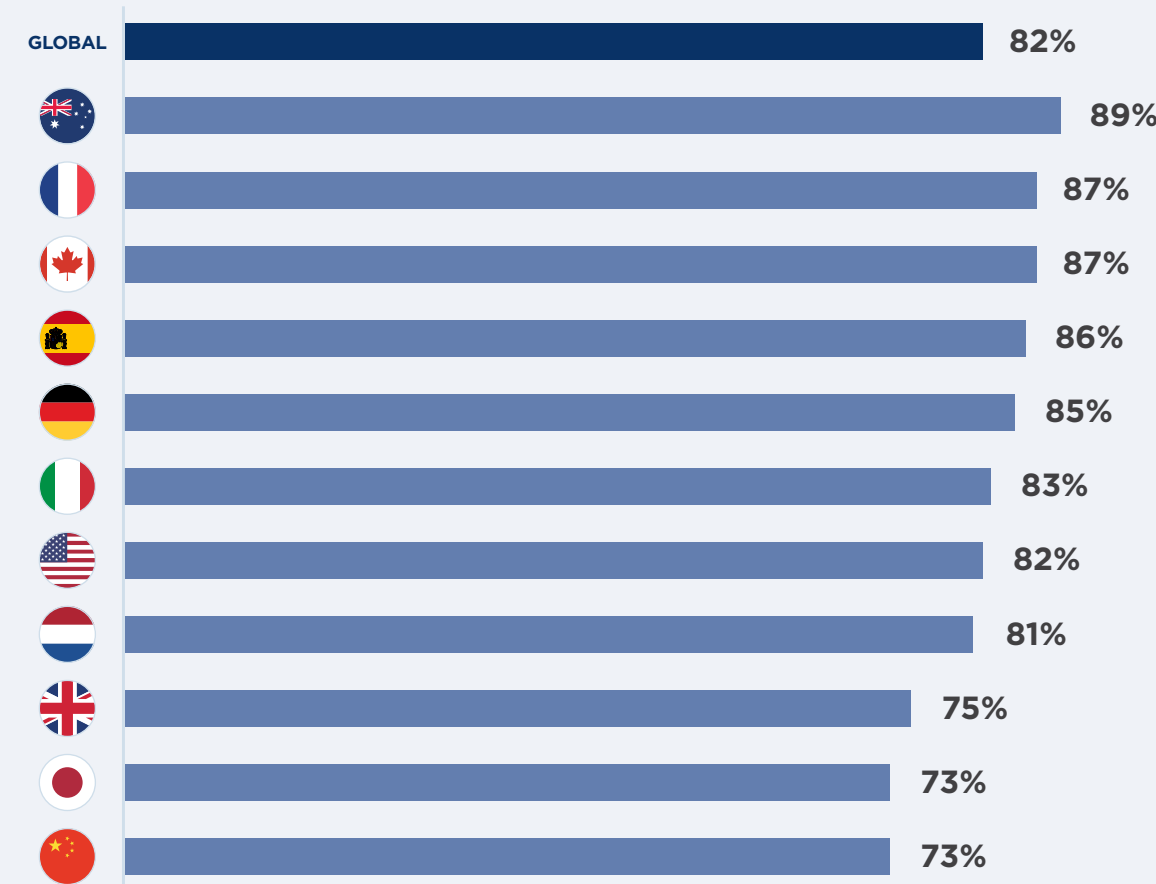
HOW PEOPLE HAVE SEEN DOCTORS OR HEALTHCARE PROFESSIONALS DURING THE PANDEMIC



* 46% of global consumers have seen a healthcare professional during the pandemic

MOST WHO SAW A DOCTOR THROUGH TELEMEDICINE DURING THE PANDEMIC DID SO FOR THE FIRST TIME

% USING TELEMEDICINE FOR THE FIRST TIME
(AMONG PEOPLE WHO CONSULTED A DOCTOR THROUGH TELEMEDICINE DURING THE PANDEMIC)



► IN THE NUMBERS

53% of people who used telemedicine during the pandemic plan to continue using it after the pandemic is over.

Younger generations found their telemedicine experience more satisfying than older telemedicine users. Men of all ages were more satisfied than women.

Gen Z (50%), Millennials (53%) and Gen X (47%) telemedicine users found it “extremely” or “very” satisfying, compared with 37% of Baby Boomers and 43% for the Silent Generation. Half of men (51%) found telemedicine satisfying, compared with 43% of women.



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